



# Making Room for Planners in



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**N**ot long ago universities, colleges, and schools identified the management of facilities as the Physical Plant Office. Albeit, the services provided by the physical plant office included complex and highly technical functions, they were mainly focused on keeping building systems operating and the campus looking good. As important as these activities are to an institution's continuance, the physical plant name was prejudged. Even so, the title was practical and it mirrored the industry's leading professional development organization, known at one time as the Association of Physical Plant Administrators of Universities and Colleges (APPA).

#### PHYSICAL PLANT EVOLUTION

In 1991, APPA underwent a significant re-branding effort and although the organization retained the recognizable "APPA," it redefined its focus as *The Association of Higher Education Facilities Officers*. Recently (2007), APPA more completely integrated its mission with the use of *Leadership in Educational Facilities* as a new tagline, and retaining only "APPA" as its official name. Over the years, APPA's professional development of its membership broadened to include educational programs for facilities professions not within physical plant operations previously. Following the rebranding trend, institutions could organize its campus functions under a broader services model.

In the literal sense, an institution's campus is the physical plant; however, renaming the unit performing physical plant operations and services as "facilities management" or "facilities services" dispelled perceptions and operational limitations. It also opened the door to service expansion and specialization in ways not previously considered because as perceptions changed, so did expectations.

Organizing as university services made it possible to channel budget and staff into specifically focused units such as Facilities Services (FS) and Facilities Planning, Design and Construction (FPDC). While Facilities Services could focus on campus operations and maintenance; the FPDC unit would address facilities planning, architectural services, and project management. These two well-defined service operations could target-manage the monetary and intrinsic value of the spaces in and between buildings. It also allowed for service expansion, such as including space management.

#### FACILITIES SERVICES PROVIDING SPACE MANAGEMENT

The significance of whether institutions describe their services office as the physical plant or something else became noteworthy as I searched university websites to find which department conducted space management functions.

In early spring 2011, I used the APPAinfo listserv tool and petitioned the APPA members to respond to a two-question voluntary survey (see sidebar). As is often the case when asking open-ended survey questions, the responses revealed an unexpected connection. Instead of just discovering whether institutions have a specific department responsible for space management duties, the responses also presented a correlation between having a university planner (also called campus planner or facilities planner) and the use of facilities rather than physical plant in the office title.

The following two-question survey was delivered to APPA member institutions via the APPAinfo discussion list, requesting voluntary input regarding their space management operations:

1. Do you have a planning team in the Facilities Services, Facilities Management, or Facilities Planning, Design & Construction Department (something similar) that manages the facilities inventory database, conducts space studies and utilization reports, is the clearinghouse for space requests, and evaluates the condition of facilities to inform capital planning as part of their job responsibilities?
2. Or are these functions handled by a separate department devoted exclusively to Space Management, Capital Planning, and Real Estate? If so, what is the name of the department and who does it report to - VP Facilities Operations, VP Administration and Finance, Provost's Office, or something else?

### Conclusions: 2011 Space Management Survey – APPAinfo List Respondents:

1. Most respondent institutions do not use "Physical Plant" in the department title that provides space management services; and most use "Facilities" as part of their department title.
2. Most respondent institutions situate space management services within the Facilities Department; and the Facilities Department is within Administration and Finance.
3. More than half of respondent institutions' departments that conduct space management services include the word "Planning" in their department title.
4. Most respondent institutions' Facilities Departments are conducting a full range of space management functions including space inventory, utilization, management, and planning.
5. Many respondent institutions' Facilities Departments have a specialized planning position(s) providing space management services.
6. Half of the respondent institutions identified using a specific committee to review/advise/and make recommendations regarding space allocation decisions; and these committees often included the provost.
7. A majority of respondent institutions (that provided a response to the decision-making process), indicated the final decision regarding space allocations was made by the president/chancellor, via a recommendation from an advisory committee.

## SURVEY RESULTS

It is a fact that some universities and colleges have replaced the office name of *physical plant* with *facilities services* or *facilities management*; however, it is more intriguing that departments referencing "facilities" have a greater occurrence of also having a planner on staff. Approximately 83 percent of the survey respondents that indicated they have space inventory or space management responsibilities also had *facilities* as part of their department title. Of those, 60 percent also include the word *planning* in their department or office title.

A majority of respondents that provided space management also indicated the service was within the *Facilities Services* or *Facilities Management* department; and more than 50 percent of those indicated the responsibility was associated with a planner position. Many of the respondent institutions that offered their process for making space management decisions indicated they do so with a designated committee that includes the Provost; and that the space inventory data are managed in *facilities services* or similarly titled department.

These percentages are based on respondent input, and although all respondent input was used, the sample size was small compared to the membership queried. In the interest of balancing assumptions derived from these conclusions, I also used an Internet search engine to cull a reference list. The resulting list of institutions that in the past or currently refer to a department as the physical plant was lengthy; therefore, I randomly selected a number of listings equal to the number of APPA respondents to the survey.

The Internet results showed that some private and public colleges and universities continue to use physical plant as an office or department; none of these randomly selected institutions using physical plant as a department had a university planner or identified space management in their physical plant operations. Interestingly, some used both physical plant and facilities management, which may indicate that for some institutions the physical plant reference hasn't been replaced and possibly the buildings operations remained in the physical plant office and facilities services encompassed all other services.

These survey results relate to a recent article by William A. Daigneau in *Facilities Manager*, "Planning, Design, and Construction in the BOK" (September/October 2011), in which the updated digital edition of APPA's Body of Knowledge (BOK) was summarized. The article refers to the completed APPA BOK, which provides overview impressions of emerging trends and responsibilities for facilities management. The APPA BOK, other literature, and this simple survey suggests that the task of managing space on campus is being offered within departments that include facilities as part of the office title.

## CHAMPION OF SPACE MANAGEMENT

Space management is more than tracking room counts and

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assigning square footage—it deals with a lot of sensitive perceptions. Most frequently it is perceived that there isn't enough space, when in reality, what the institution lacks is suitable space. Determining suitability requires assessment metrics such as quantity, quality, functionality, accessibility, and operational cost effectiveness<sup>2</sup>. Maintaining space to meet these metrics requires invested renewal and scheduled modernization to prevent the low utilization that often occurs when spaces become deficient.

Determining space suitability is part of effective space management. As a valuable asset, managing space requires comprehensive and integrated data that are continuously and accurately updated and organized space by one of its major functions. Space management's major functions can be grouped as:

1. Space Administration (policy; allocation procedures)
2. Space Inventory (suitability—count, category, condition, configuration, and adjacencies; spatial representation; special places; annual audit)
3. Space Planning (standards; ratios and trends; pedagogy; capital renewal)
4. Space Utilization (metrics; optimize; best use; efficiencies)

Managing space needs to be championed. These functions can be dispersed to various committees, departments, and individuals; but collectively—the constant participant within all four functions should be a university or campus planner. As staff, the planner will understand the constraints and vision for development of the campus particularity through implementing (or developing) a campus master plan. A campus planner involved in space management can infuse the well-vetted master planning principles and strategic vision into space management. At the very least, a campus planner on staff can effectively relate long-term, land-use, and urban development principles, community involvement techniques, and trends that the institution may incorporate in comprehensive approaches to managing space.

Some of the best resources on space management are reports and publications offered through APPA, such as the previously mentioned APPA BOK: Body of Knowledge. It provides general philosophies and latest buzzwords on managing space, such as designing space that is flexible and continually adaptable in order to accommodate the changing expectations of students and pedagogy demands<sup>3</sup>. APPA, and other resources, provide information on the complexities, peer-tested outcomes, software, and trends that support the view that effectively managing institutional space begins with managing its major functions. And it is important to note that the 2012 APPA Thought Leaders symposium focused entirely on space management and utilization. That report will be published in September and excerpted in *Facilities Manager*.

The Society for College and University Planning (SCUP) is also a good resource, particularly its premier journal, *Planning for Higher Education*. A SCUP featured approach for an inclusive

space management program is to consider special places—those facilities and spaces that are interwoven into the education experience such as museums, libraries, performing arts and recreation centers, and residence halls. The entire campus is sorted into four core space groups: cultural, institutional, student, and outdoor<sup>4</sup>, in order to capture all student-related spaces and investigate the potential to expand teaching or classroom space without constructing new buildings.

In addition to these professional organizations, experienced planners and consultants also contribute resources, often in the form of feasibility studies. Although these studies propose recommendations specific to one university, they offer new ideas and terminology; and often a strategic place to begin a cultural change is with terminology. An interesting set of terms in one study placed the emphasis of the space assignment on the action of scheduling and less on the controlling entity of the space by using “scheduled pool classrooms” and “scheduled department classrooms”<sup>5</sup>. These terms help defuse the issue of space ownership by emphasizing the activity of scheduling courses into spaces.

#### A PLANNER'S ROLE IN FACILITIES MANAGEMENT

Historically, universities and colleges have had a university architect position, and often that position was also involved in managing space. The advent of a campus planner is a newer concept, but an increasing trend, especially evident in facilities services organized with planning in the department title. Although there are numerous types of planners, a land-use planner has a skill set and experiences that are most transferable to a university campus. A land-use planner focuses on long-range outcomes and incorporates environmental or sustainability principles to urban planning. Universities and colleges are microcosms of their host communities, and are usually significant economic engines of commerce, public transit, and employment providing local leadership.

Land-use planners with experience working for jurisdictional authorities such as city or county governments have knowledge of critical observation and collaboration, data collection and analysis, and the preparation of objective recommendations to achieve equitable and thoughtfully planned transformations of all types of spaces. Often land-use planners mediate opposing entities in order to keep all stakeholders at the table, participating in interest-based solutions. An experienced land-use planner is likely to be familiar with public participation techniques, including mediation or conflict resolution methods and practice in connecting diverse community factions towards participative decisions. These valuable skills are transferable to the university or college arena.


There are skilled space planners who specialize in designing and analyzing spaces; however, a land-use planner's vision may be more long-range offering proposed solutions that may mitigate multiple issues. An advantage of having a land-use

planner in facilities services is the opportunity to weave into the campus fabric land use principles and movements such as New Urbanization, walkable communities, Green Communities, Smart Growth, growth management, and Complete Streets to campus planning; using a toolbox equipped with space use concepts such as densification, proportional open space, brownfield development, historic and cultural preservation, and wayfinding.

While these principles and concepts are usually associated with master planning, they can be substantively scaled to influence space management and produce surprising outcomes. Collectively, these principles and concepts work in concert to achieve placemaking, and being a desired place is fundamental to recruitment and retention goals.

### SUMMARY

The intent of the two-question survey was to find out whether space management was being performed in facilities operations of institutions of higher education. The survey results revealed that institutions that have organized their service units as facilities services/facilities management also appear to be responsible for more planning functions and often included a professional planner position.

It may be that universities and colleges are including land-use planners in facilities service operations in search of new dimensions to effective comprehensive space management—but it begins with making space for a planner. 

### ENDNOTES

- 1 <http://www.appa.org/aboutUs/history.cfm>
- 2 Daigneau, William A., editor. *Planning and Managing the Campus Facilities Portfolio*, APPA and NACUBO, 2003.
- 3 Bilotta, Joe. APPA BOK, Part IV-A: Facilities Planning: *Space Planning and Administration*.
- 4 Rickes, Persis, editor. *Special Planning for Special Spaces: Selected articles from Planning for Higher Education*, SCUP, 1997.
- 5 Ira Fink and Associates, Inc., University Planning Consultants. *The Ohio State University, Instructional Space Feasibility Study, Final Report*, April 2009. <http://registrar.osu.edu/scheduling/spacestudyfinalreport.pdf>

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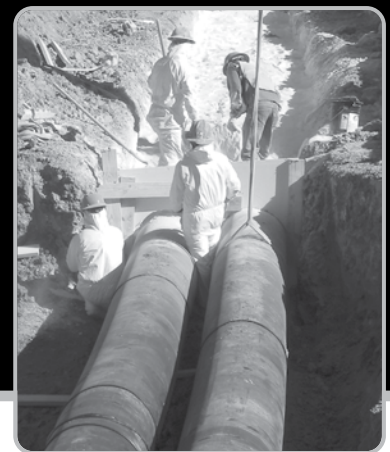
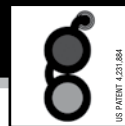
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